DOCUMENT RESUME

ED 148 857 TM 006 742

TITLE	The Refinement and Modification of an Instrument for Assessing the Achievement of Interpersonal Skills of Social Work Students. Institutional Report No. 4. Wayne State University.
INSTITUTION	Cooperative Assessment of Experiential Learning Project, Princeton, N.J.
SPONS AGENCY	Carnegie Corp. of New York, N.Y.
PUB DATE	Sep 75
NOTE	72p.
AVAILABLE FROM	Cooperative Assessment of Experiential Learning, American City Building, Suite 403, Columbia, Maryland 21044 ($2.00)
EDRS PRICE	MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS	*Behavior Rating Scales; Check Lists; College Students; Communication Skills; Field Experience Programs; *Graduate Students; Higher Education; *Informal Assessment; Interpersonal Competence; *Job Skills; Performance Based Education; Problem Solving; *Social Work; Social Workers; Student Evaluation; *Test Construction; Undergraduate Students
IDENTIFIERS	Experiential Learning; *Performance Assessment Checklist; Wayne State University MI

ABSTRACT

The Performance Assessment Checklist (PAC) was developed by the faculty of the Social Work Practice Sequence of the Wayne State University School of Social Work as a result of the need for a behaviorally specific instrument to assess student performance in the field work practicum. This instrument makes possible a systematic assessment of student performance as a means of pinpointing areas of strength and areas requiring additional emphasis on the part of the student and field instructor. The PAC consists of 12 check lists for rating student learning which fall into three areas: basic educational and performance skills, communication and observation skills, and problem solving skills. The original PAC and two revisions are appended. (Author/MV)

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Institutional Report No. 4
Wayne State University

THE REFINEMENT AND MODIFICATION OF AN INSTRUMENT FOR ASSESSING THE ACHIEVEMENT OF INTERPERSONAL SKILLS OF SOCIAL WORK STUDENTS

COOPERATIVE ASSESSMENT
OF EXPERIENTIAL LEARNING

TM006 742

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CAEL Institutional Report No. 4

Wayne State University

THE REFINEMENT AND MODIFICATION OF AN INSTRUMENT FOR ASSESSING THE ACHIEVEMENT OF INTERPERSONAL SKILLS OF SOCIAL WORK STUDENTS

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Cooperative Assessment of Experiential Learning

September 1975

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This Institutional Report was prepared by:

The School of Social Work and The Center for Urban Studies
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This report describes the refinement of an instrument for the assessment of the achievement of interpersonal skills of graduate social work students and for its modification for applicability to undergraduate social work students.

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I. INTRODUCTION

The Performance Assessment Checklist (PAC) was developed by the faculty of the Social Work Practice Sequence of the Wayne State University School of Social Work as a result of the need for a behaviorally specific instrument to assess student performance in the field work practicum. The PAC instrument was originally used during the 1973-74 academic year at the end of each of the three quarters as part of the ongoing assessment process. It was also used in the Fall Quarter, 1974.[1]

Refinement of the instrument began in the Winter Quarter, 1975, and the revised PAC was first used in March, 1975, at the end of that quarter.[2] The instrument was applied a second time in mid-June at the end of the Spring Quarter after further revision.[3] The instrument was utilized for the assessment of field work performance of 80 Bachelor of Social Work (BSW) students (71 juniors, 9 seniors) and 40 first year Master of Social Work (MSW) students enrolled in the Social Work Practice Sequence.[4]

Because of the calendar of the academic year at Wayne State University, with the Spring Quarter ending on June 20, tabulation of the data has not been completed. It is therefore not possible to write a final report at this time, and this report represents an interim statement.

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[1] This initial instrument will be referred to as the "original" PAC.

[2] This will be called the Phase 1 PAC.

[3] This will be called the Phase 2 PAC.

[4] As it may be difficult for the reader to differentiate between evaluation of the performance of students, which is the purpose of the PAC instrument, and evaluation of the PAC instrument itself, which has been the focus of this project, the term "assessment" will be used for the evaluation of student performance and "evaluation" will be used with reference to the instrument itself.

II. BACKGROUND AND STATEMENT OF THE PROBLEM

Culminating several years of work, the faculty of the Social Work Practice Sequence of the Wayne State University School of Social Work completed the first phase of the development of a Performance Assessment Checklist (PAC) in 1973-74. This project was instituted as a result of a recognized need for a behaviorally specific instrument to assess student performance in the field work practicum based on the identification of specific behaviors and activities of students reflecting their learning. The instrument is intended to counteract some of the prevailing patterns in the assessment of performance, such as ambiguous or descriptive reports, or assessments presented in terms of personality dynamics, which do not enable the student to identify his or her location in the educational process as a basis for formulating clear educational objectives. The development of the PAC thus is an outgrowth of the need for an instrument which will make possible a systematic assessment of student performance as a means of pinpointing areas of strength and areas requiring additional emphasis on the part of the student and field instructor.

It should be pointed out that field instructors are social workers employed by social agencies, schools, or community programs who are donating their time and energies in directing students in their field work activities. It is recognized that the PAC has to be brief, comprehensible to practitioners, and easily usable.

The PAC which was developed in 1973-74 (the original PAC) represented the first phase in an effort to devise such an instrument and was used as a tool for the assessment of the field work performance of 40 graduate students in the Social Work Practice Sequence during that year.

It was applied at the end of each of the three quarters in 1973-74 as part of the ongoing student assessment process with the purpose of familiarizing students, faculty, and field instructors with the instrument, helping them become comfortable with the use of this format, and obtaining initial feedback as to its utility as an assessment instrument. Problems and benefits in the use of the PAC were identified by faculty, field instructors, and students by the end of the 1973-74 program year as follows:

a. Systematic orientation of field instructors is necessary for reliable utilization of the instrument. This is particularly necessary to clarify specific items in the checklist and to develop greater uniformity in rating.

b. One of the most important benefits in the application of the PAC is its assessment focus on the educationally relevant areas. Furthermore, it helped to clearly identify areas of strength and areas requiring improvement.

c. However, there appeared to be a need for more refined assessment than was possible under the three-point rating scale used at that time ("Satisfactory Performance," "Satisfactory Performance with Added Emphasis Needed," and "Unsatisfactory Performance"). A more comprehensive scale to measure performance would permit more refined judgments as a basis for developing specific learning objectives.

d. There was a need to adapt the PAC instrument to the assessment of the field work performance of undergraduate students in the new Bachelor of Social Work Degree Program. This program had just completed a two-year pilot period and was beginning operations on a much larger scale, reflecting an important new direction in the social work profession as a result of a decision of the National Association of Social Workers that the BSW degree,

rather than the MSW degree, shall be the first professional degree. The original PAC instrument was used in relation to Social Work Practice students in the MSW program. The Social Work Practice curriculum is the newest curricular area to be developed at the School of Social Work, and provides students with an integrated format to social work practice combining the traditional social work methods of casework, group work, and community social work within a problem-solving frame of reference. This is the curricular format which is also being utilized in the BSW program. It should therefore be possible to adapt the instrument for assessment of BSW students as a result of the common curricular emphasis. Furthermore, the use of the instrument should make possible comparisons in the performance of BSW students and MSW Social Work Practice students.

III. OBJECTIVES

As a result of the identification of the problem and needs related to the development and utilization of the original PAC instrument, two major objectives seemed indicated for 1974-75:

1. Maximizing the utility of the instrument as an assessment and educational tool for field instructors and students.

2. Gathering significant data as a result of the administration of the PAC to BSW and MSW Social Work Practice students to identify commonalities and differences in their performance.

The following are the activities which were identified for 1974-75 relating to these objectives for which CAEL funding support was received:

a. Development of a systematic and uniform utilization of the PAC instrument by field instructors:

   i. orientation meetings with field instructors at the beginning of the academic year,

   ii. monitoring the utilization of the PAC,

   iii. periodic meetings with field instructors regarding their questions or problems in the use of the PAC,

   iv. development of a core group of field instructors who would take the responsibility for the orientation to the use of the PAC by new field instructors in the future.

b. Development of a more refined scale to measure performance:

   i. develop a scale in consultation with field instructors, and

   ii. field test the new scale with students and field instructors, and make appropriate modifications based on feedback.

c. Refinement of the PAC to maximize its utility:

   i. shorten the length,

   ii. revise the language related to the concepts and frameworks familiar to students and field instructors,

iii. rearrange the various content sections under a useful organizing framework.

d. Co-ordination of these efforts in order to achieve a systematic utilization and refinement of the instrument this year and as a means of enhancing the educational program of the School of Social Work.

IV. FACULTY AND PROGRAMS INVOLVED IN THE IMPLEMENTATION OF THE PROPOSAL

The project is directed by the proposer, Professor Kurt Spitzer, ACSW, and Chairman of the Social Work Practice Sequence. A description of his background was enclosed with the original proposal. He is one of several faculty members who, in 1967, took initiative to develop an innovative curriculum at the School of Social Work that provides students with a more comprehensive framework to social work practice, utilizing a problem-solving process in relating to the needs and problems in social functioning of individuals, families, groups, and communities. It was in the process of the ongoing development of this program that the PAC instrument was developed as a tool for performance assessment and curriculum development. Professor Spitzer, together with other members of the Social Work Practice Sequence, was actively involved in its formulation.

The implementation of the project activities was carried out in cooperation with faculty and staff of the University's Center For Urban Studies, which has provided many important resources. The Wayne State University Center for Urban Studies is a research, education, and service center that works with the several schools and colleges of the University and the community, attempting to coordinate scholarly activities concerned with urban, suburban, and metropolitan phenomena. Its community thrust is to initiate, facilitate, and disseminate research of the highest quality on significant urban issues. Wherever possible, the Center involves the faculty of the University on a project basis and is so structured that it can call upon any of the myriad University resources. The Center's major activities result in a broad program of theoretical and applied research.

The following members of the Center for Urban Studies staff have been active in this project:

Sue Smock: Coordinator of Research at the Center, is consultant on the project. Aside from research administration, her particular area of interest is research and evaluation methodology. Her training is in Sociology (M.A.) and Department of Research and Evaluation at Wayne State University, College of Education. Ms. Smock also teaches a number of graduate courses in various aspects of methodology.

Letitia Haworth: Project coordinator. Ms. Haworth's primary assignment at the Center has been to coordinate an interdisciplinary University and community Early Childhood Care and Education Council. Her professional training has been in social work, and she received her MSW from the Wayne State University School of Social Work.

V. PROCEDURES TO STRENGTHEN PAC AS AN ASSESSMENT TOOL

Based on ongoing feedback from students and field instructors as a result of their use of the PAC, modifications occurred during 1974-75 in the prescribed field work assessment process of which the PAC was an integral component, and in the format of the PAC instrument, including a revision in the rating scale and rating procedures. Several methods were employed in an attempt to ensure enlightened use of the original PAC by students and field instructors:

1. The instrument was introduced and discussed with students in their methods classes and with field instructors in orientation seminars.

2. Field instructors and students were given specific directions in writing regarding the purpose of the instrument, the rating scale, and the process to be used.

3. The PAC was applied as a part of a field work assessment conference held during the last three weeks of the Fall Quarter. In this conference the field instructor, faculty advisor, and student were expected to be active participants. The ratings of each of these participants on the various items were then recorded on the PAC. Usually these were based on recollections of specific situations involved in the student's field assignments where the student's competencies in the particular area being reviewed had been utilized. If there were differences in the ratings of the three participants, these would be discussed. If they could not be reconciled, they were then reported independently. Frequently this was the basis for some narrative comments following the numerical ratings. (Please refer to the Appendix for copies of the PAC in its three different formats as used in 1974-75.)

A change occurred subsequently in the role of the faculty advisor in the assessment process. Because the advisor is not involved in the ongoing practicum, it seemed appropriate to all involved that the actual rating should be carried out by the student and the field instructor who are in a continuous relationship with one another as part of the ongoing field work process.

However, the faculty advisor continued to be involved as a facilitator of the assessment process, to clarify questions related to the understanding of the various items in the checklist and to ensure uniform application of the ratings.

Feedback regarding the time involved in the application of the PAC in the assessment conference led to a modification in procedure. Students and field instructors were provided with work sheets to use for self-rating as preparation to the conference, with the conference being used to arrive at a composite rating arising out of conference discussion. It was hoped that in addition to saving time, the pre-conference work and thinking would result in more dynamic discussion related to identification of educational needs, objectives, and future field work activities designed to carry out these objectives. There appeared to be general agreement that the pre-conference worksheet process made the assessment conferences more meaningful.

As part of this change in procedure related to the utilization of the Phase I instrument, students and field instructors were asked to make an effort to arrive at a forced composite rating in instances where they could not come to an agreement, whereas previously they were able to indicate separate ratings. This procedure was instituted to facilitate the tabulation of data. However, many students and field instructors insisted on being able to make separate ratings. Interestingly enough, the reaction revealed that the opportunity to state their differences and to be able to see these clearly identified represented a feature of the original PAC which was valued by all and which was therefore reinstituted in the Phase 2 PAC.

Another major difference in the utilization of the PAC has to do with the extent of its application. In the Fall Quarter, except for the undergraduate

seniors, only those segments dealing with Work Habits, Learning Patterns, Values and Observation, and Communication Skills, reflecting the beginning emphasis in the class and field work curricula, were utilized. However, in the subsequent quarters, field instructors and students were instructed to utilize the entire PAC instrument in the assessment process and to attempt ratings even in relation to content areas where there may not have been coverage in either the class or field work curricula at that time. The purpose for this procedure was to begin to deal with baseline data for measurement of change. Furthermore, such data can be accumulated to compare the competencies of entry-level students at the BSW and MSW levels of study. It may be found that some areas are not appropriate for assessment of performance during the BSW students' junior year because of various factors, such as their being in field work only one day per week compared with the three days of field work of the graduate students. The data secured from the utilization of the entire PAC in the two quarters this year for juniors, seniors, and first year graduate students may provide further insight into the question of how the instrument, or portions of it, can best be used in the future.

There was an ongoing process to simplify the language and shorten the instrument, with many redundant items being eliminated. The topical areas were re-organized under a format emphasizing the Problem-Solving Process focus used in the Social Work Practice curriculum, as follows:

Basic Educational and Performance Skills

A. Learning Patterns

B. Work Habits

C. Values

Communication and Observation Skills

D. Interpersonal Communications and Relationship Skills

E. Observation

Problem-Solving Skills

F. Problem Definition

G. Fact Finding

H. Assessment

I. Designing a Plan of Action

J. Intervention

K. Termination/Transfer

L. Evaluation

The original PAC utilized a three-point rating scale: "Satisfactory Performance," "Satisfactory Performance with Added Emphasis Needed," and "Unsatisfactory Performance." The rationale for this was the interest of field instructors and faculty to identify whether the student had made satisfactory progress in the particular area being rated during the quarter.

With the added perspective of utilization of the PAC instrument as a tool for differential assessment of actual performance achievements by BSW and MSW students, there was necessity for the development of a rating framework which would make possible ratings reflecting the degrees of competence achieved by the student. This meant developing a rating scale which will provide opportunity to discriminate between various points of competence and at the same time would not result in a "splitting of hairs" with undue complexity and frustration for the participants in the rating process.

As a result a Likert scale was developed, with "1" representing the judgment that the behavior was "rarely" being demonstrated, and "5"

representing "always." The numbers "1 to 5" were utilized rather than "0 to 4" for several reasons: there is no 0 point because it is assumed that no student comes in without having some skill in relation to most of the items. End points are rarely used in rating scales and it is assumed that if one of the end points is "0" it will be used even less frequently than when it is identified as "1." Finally, a "0 to 4" scale makes "4" the 5th point, leading to possible confusion. Originally, the scale was intended to move from "never" to "always." "Rarely" was substituted for "never" because the field instructors participating in the Phase 1 revision felt "never" was too negative a statement. "Always" has been changed to "Consistently" in the Phase 2 PAC, based on a feedback from students and field instructors who felt that this was a more realistic expectation.

The scale is expected to test performance competency as well as growth or change. Quality is implied by the rating 1 to 5. Growth is measured by testing more than once and will be assessed by comparison of one quarter's results with the next. Furthermore, the instructions provide for additional symbols, such as "X" where inadequate progress has been made, or "√AE" where there has been adequate progress but more concentrated attention is needed in the next quarter.

VI. PROCEDURES TO EVALUATE THE UTILITY OF THE PAC INSTRUMENT

The following feedback mechanisms were used:

1. A questionnaire was enclosed with the Phase 1 PAC instrument to elicit reactions to the instrument and to encourage recommendations for its improvement. (A copy of the questionnaire can be found in the Appendix.)

2. One of the members of our research staff conducted interviews with three field instructors selected to reflect different types of agencies and involvement with students at different levels of study. They were interviewed 6 to 10 weeks after their utilization of the Phase 1 PAC. The interviews lasted between 10 and 20 minutes each. The field instructors were one male and two female social workers in a drug, a hospital, and a clinic setting. The breakdown of their students included one graduate and two undergraduates; one graduate; and two undergraduates respectively. The field instructors were asked questions regarding the length, content, and format of the assessment checklist.

3. Throughout the year some of the educational program units in which the Social Work Practice students were involved held regular monthly and sometimes bi-monthly meetings with field instructors, and the PAC was regularly discussed at these meetings. Considerable feedback was obtained, and many suggestions were incorporated in the Phase 1 and 2 revisions.

4. Faculty advisors had ongoing contacts with field instructors in relation to the students' progress, and these contacts frequently provided opportunity to discuss the utility of the PAC. They also

obtained direct feedback as a result of their participation in the assessment conferences.

5. Some field instructors inserted written comments about the instrument in some sections of the PAC itself.

6. The analysis of the PAC ratings will provide additional data regarding the field instructors' reactions and attitudes as evidenced in their utilization of the PAC instrument.

VII. PRELIMINARY FINDINGS

As indicated in the introduction, due to the nature of the University academic year with the Spring Quarter ending late in June, tabulation and analysis of the data obtained from the use of the PAC or the questionnaire to evaluate the instrument is still in process. However, considerable feedback was received through the mechanisms described in the previous section. Furthermore, comments after each section on the PAC were scanned and revealed various concerns, some of which were addressed in the Phase 2 revision, such as eliminating redundancies, clarifying the language, and shortening the length of the PAC.

In summary, ongoing formal and informal feedback channels were used, from students and field instructors, in the refinement of the PAC instrument. In the Appendix, the reader will find three copies of the PAC instrument: the first represents the format used in 1973-74 and in the Fall Quarter of 1974, prior to the start of our activities towards the further refinement of the instrument; the second is a copy of the first revised PAC format used in the field work evaluations in the Winter Quarter of 1975; and the third represents the current format utilized in the 1975 Spring Quarter.

At this time it appears that the majority of respondents see the PAC as a useful educational tool, even with some concerns about length and confusion about intent. They feel it helps to delineate strengths and weaknesses in student performance and gives direction to the field instruction.

Preliminary feedback from the use of the Phase 1 PAC indicated some problems in understanding and use of the PAC by field instructors, due largely to the fact that faculty advisors were not able, in several cases, to participate in the

evaluation process due to time limitations. Yet this participation appears to be vital, as faculty can provide clarification of specific items and can help to insure consistent use of the instrument.

Some field instructors raised questions regarding the appropriateness of various sections as a learning experience, and often a rating was not made because the respondent viewed the item as inappropriate. A comparison of results between the Winter and Spring Quarters will hopefully clarify whether the perceived inappropriateness was a function of the quarter (i.e., too soon in the year to judge the behavior), the educational level of the student (juniors, seniors, or graduate students), or some non-systematic factor.

Other field instructors appreciated having specific areas identified as being important to focus upon in the education and assessment process, and there seemed to be unanimity regarding the utility of specifying and being able to see student and field instructor ratings side by side.

Feedback elicited based on the interviews of three field instructors revealed that all indicated that use of the PAC was a time-consuming process. Nevertheless, they felt it was a useful tool. It is helpful as a means of ascertaining where the student is in the educational process and is equally applicable to graduate and undergraduate students. The checklist format helps to identify specific strengths as well as areas requiring further work and is particularly useful in combination with a narrative assessment.

Based on preliminary feedback, one significant philosophical problem arises from the development of the PAC. The emphasis on accountability and competency-based criteria for professional performance has dictated the necessity for an objective and systematic assessment of students' strengths and weaknesses. This may be seen, however, as a movement from a humanistic, interpersonal

approach to a dangerously dehumanizing one. One field instructor commented that the PAC was another step toward computerizing students and making numbers of them. We believe the PAC can actually help to increase the individualization of students, and the humanistic aspects need not be lost if applied with sensitivity and respect for the student as a growing and developing professional person. The problem is most significant if the PAC is abstracted from human contact. Hence the importance of the participation of the three parties--the students, the field instructor, and the faculty advisor--in the assessment process, and the emphasis on the PAC as one part of an ongoing assessment. Recognizing that the age of accountability is here, it is vitally important that a humanistic orientation be maintained as we develop performance criteria which will determine competence.

VIII. IMPLICATIONS OF THE FINDINGS FOR FUTURE DEVELOPMENT

1. A final report on the 1974-75 activities will be submitted as soon as the June data is tabulated and analysis is completed. Analysis of the data obtained from the use of the PAC will provide considerable insight and feedback regarding how the PAC was actually used and answers to questions such as these:

a. How much discrimination in judgment was there?

b. Was there a tendency to be overly generous or non-discriminating by an overabundance of high ratings?

c. Did the ratings usually seem to correspond with the narrative comments?

Data related to these questions will enable us to obtain a picture as to the reliability of the PAC instrument.

2. Our activities this past year have resulted in considerable refinement of the PAC instrument which has greatly enhanced its utility. Work, however, is necessary to ensure more uniform use of the ratings by field instructors; this would increase the reliability of the data. Furthermore, most field instructors need further assistance in the use of the instrument both as an educational guide and as an assessment tool in their work with students. At this time we see the necessity for several one- to two-day workshops to assist them with more effective utilization of the instrument. In these workshops, faculty not yet familiar with this tool for assessment of experiential learning would be able to participate. This is in line with CAEL's perspective for projects for the education of increasingly larger numbers of educators in the use of experiential assessment instruments. Faculty and field instructors participating in

such workshops will be expected to give leadership the following year to educate colleagues who are new to this process of competency-based assessment of experiential learning. We would hope to receive CAEL financial support for such activity in 1975-76.

This would be significant activity as we intend to continue to utilize the PAC format with junior year, senior year, and first year graduate students in 1975-76 and subsequent years.

We have speculated as to possible reasons underlying some of the negative reactions to the use of the checklist by some of the field instructors. At this time we have postulated the following factors which appear to be involved:

1. The purpose for the use of the PAC in relation to its contribution to the educational process of the student and to its potential contribution to social work education is not clearly understood by many field instructors.

2. The social work model which is the frame of reference for the PAC represents a new, integrated approach to Social Work Practice and is not well understood by many field instructors.

3. This social work model is either fully or partially incompatible with the practice model used by some of the field instructors.

4. The PAC requires the field instructor to make a judgment in relation to a specific level of skill on each checklist item. Many social workers have not been educated to make judgments that are behaviorally specific and it is not a normative process for many field instructors to think along these lines.

5. Many social workers believe the use of more systematic procedures, such as rating scales, is dehumanizing rather than individualizing of the student.

6. Many of the newer field instructors, who were not involved in the process which has been going on for several years in the development of some form of checklist, feel that this instrument was imposed on them and reacted on the basis of feeling that they have not had a voice in its development and/or use.

The proposed plan of a series of workshops with field instructors through which many of these and related concerns can be addressed will utilize the concepts of planned individual and social change developed by Chin and Benne,[5] and by Edgar Schein.[6]

Benne and Chin conceptualize the need to effect change through the utilization of rational-empirical, normative-re-educative, and power functions.

The issues posed by the reactions of the field instructors and some faculty members require:

1. input in the form of knowledge and information (rational-empirical change efforts);

2. addressing the values, attitudes, and reactions to the PAC modality (normative-re-educative approaches); and

3. a clarification of the power-authority issues inherent in the relationships between the School of Social Work and field instructors and the agencies.

Edgar Schein identifies three phases involved in human change:

Unfreezing,

Changing, and

Refreezing

Our plan of work will be two-fold: (1) through the Workshops and our ongoing work with field instructors to increase collaborative relationships with field instructors, which will include a more effective use of the PAC; and (2) a study of the change processes which are involved in our work with field instructors utilizing the Benne and Chin and the Schein frameworks.

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[5] Robert Chin and Kenneth D. Benne. General strategies for effecting changes in human systems, in The planning of change. New York: Holt, Rinehart, & Winston, 1964.

Such a study of the processes involved in effecting change to assist participants in experiential assessment to develop an enlightened, sensitive, and humanistically oriented view of such instruments, we believe, would have significant implications for the increasingly large number of educators involved in the utilization of competency-based assessment approaches.

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[6]Edgar H. Schein. Professional education: Some new directions, 10th of a Series of Profiles Sponsored by the Carnegie Commission on Higher Education New York: McGraw-Hill, 1972.

APPENDIX A

Original PAC with Cover Letter

1973-74 and Fall Quarter 1974

WAYNE STATE UNIVERSITY
SCHOOL OF SOCIAL WORK

MEMORANDUM

TO: All Social Work Practice Field Instructors and Students

FROM: Kurt Spitzer, Chairman, Social Work Practice Sequence

SUBJECT: Field Work Evaluation for Fall Quarter

DATE: November 18, 1974

We would like to ask your assistance in participating in a two step evaluation process with our students:

Step 1: Every student completes the appropriate sections of the Student Performance Evaluation (enclosed) prior to the evaluation conference. We believe self assessment is an important skill to be developed by every social worker.

Every field instructor completes the appropriate sections of the Student Performance Evaluation for every student for whom he/she carries responsibility prior to the evaluation conference.

The following sections are to be completed by all students and field instructors in their individual ratings: Page 1, IA through F only, and Page 2, II a, b, and c.

In relation to Section III "Performance Checklist", all students and field instructors should complete parts I "Learning Patterns" through VII "Values."

In relation to BSW Seniors, parts VIII and IX should also be included.

In completing this process please note that we are asking the ratings to represent your assessment of whether progress was made in each of the areas being rated. We assume that students entered this quarter with different backgrounds and different levels of skill, and there will be marked differences at the end of this quarter. We are not asking to make comparisons between students in relation to some fixed point. But we are asking whether growth has occurred in some demonstrable way that has moved the student further along in his/her skill development from the beginning of the quarter.

Re: Section IV
As you complete the rating process, on a separate sheet of paper, jot down--in outline form--certain specific instances which would serve as documentation or rationale for the ratings to have come out the way they did in each part. This should be brief, and to the point.

Step 2: The student's advisor (who is also the faculty liaison to the agency) will be contacting the field instructor and the student to invite him/herself to participate in the field work evaluation conference to be held at a date convenient to all three parties. His role will be to serve as a facilitator in this process.
In order for us to engage in this process in a constructive and organized manner, the School has permitted us to complete this process beyond the end of the Fall Quarter, if necessary. However, it must be completed by January 9, 1975.
The purpose of the evaluation conference is to arrive at a composite perception of the student's work, which should be more than the sum of the student's and field instructor's individual assessments. The ratings which come out of this conference shall constitute the official version of the student's performance. Again, a statement of rationales and documentation should accompany the checklist.

The determination of grades shall be based on the outcome of the conference, and sections IG and H shall be completed on the composite evaluation form.

The evaluation conference should lead to a specification of future educational objectives and next steps in the field work process, including specification of types of assignments and activities. This should be explicated in Section V.

The field instructor will take responsibility for the actual final draft of sections II, IV, and V, to reflect the composite of all inputs made during the evaluation conference. The student should have the opportunity to see a copy of this draft and possibly suggest any modifications if he/she feels any are indicated. (If it turns out there are irreconcilable differences in perception, the draft should then reflect both points of view.) This material will accompany the composite checklist and should be sent to the faculty liaison,
c/o Wayne State University
School of Social Work,
Detroit, Michigan 48202
no later than January 15, 1975.

These directions probably sound more complex than the process really is. In the interest of all of us jointly developing a sound quality program, I hope you will fully co-operate and participate in this process. We will be very receptive to any ideas you may have regarding streamlining the process.

Your faculty advisor/field liaison person will be happy to assist you.

Sincerely,

Kurt Spitzer

Kurt Spitzer, ACSW
Professor
Chairman, Social Work Practice Sequence

KS/ksf
Enclosure

S C H O O L O F S O C I A L W O R K
WAYNE STATE UNIVERSITY DETROIT, MICHIGAN 48202

SOCIAL WORK PRACTICE PROGRAM

STUDENT PERFORMANCE EVALUATION

I. FACE SHEET:

A. Student's Name_____

B. Agency_____

C. Learning Center_____

D. Field Instructor_____

E. Faculty Member_____

F. Number of Clock Hours Completed_____

Please note:

In the Fall Quarter each day of school attendance during the placement selection process should be counted as a field work day. For most students this amounted to a total of four days. Students also receive clock hour credit each quarter for the one-hour lab session included with methods class. The total for that is eleven hours per quarter.

G. Recommended Field Work Grade_____
Grading system to be used:
For graduate students, assign Satisfactory or Unsatisfactory

For undergraduate students, use letter grades as follows:

A - Superior Performance
B - Above Average Performance
C - Average Performance
D - Below Average but Passing Performance
E - Non-Passing

H. Signatures of Participants in Evaluation Process

_____
Field Instructor

_____
Student

_____
Faculty Member

II. DESCRIPTION OF FIELD EXPERIENCE

This should include:

(a) a listing of specific learning objectives and needs of the student, as identified at the beginning of the quarter;

(b) a listing of some of the field experiences, tasks and assignments in which the student has been actively engaged, and a description of how these were or were not related to the specific educational objectives of the student and/or the educational objectives for all students this quarter (i.e., development of beginning knowledge and skill in observation and interpersonal communications and relationships);

(c) an identification of those factors in the total field experience which seemed to enhance or impede the educational process. Include any such factors which you can identify in the learning center or agency. No placement is "utopian" or "problem-free." We are hoping, however, that a frank and open recognition of problems as well as strengths will lead to the development of a firm basis for the student's learning. Please evaluate here any relevant aspects of the field experience, such as educational philosophy, practice approaches, interpersonal relationships, organizational structure, administration, etc., which either strengthened or tended to interfere with student's learning experience.

III. PERFORMANCE CHECKLIST

The purpose of the attached checklist is to enable us to arrive at an assessment of the student's skills in the utilization of the problem-solving process, particularly in the areas emphasized in the first quarter, such as observation, fact-finding, interpersonal communications and recording, as a guide for the direction of his learning tasks in these areas in the next two quarters.

You will note that the checklist consists of a series of expected practice behaviors. These behaviors represent expectations as to where students should ultimately be in their practice development.

The task here is for the student, field instructor and faculty member to rate the student's progress this quarter for each practice behavior as follows:

Check (✓) if satisfactory progress was made this quarter.

✓A.E. (Added emphasis) for items which you and/or the student feel that adequate progress has been made but which you want to identify for more concentrated attention in the next quarter.

Mark (X) if progress is below expectation for the quarter.

N.A. (not applicable) if there has been no opportunity for evaluation of this behavior this quarter.

IV. ELABORATION OF PERFORMANCE CHECKLIST

This should include descriptions of:

Any checklist items which students, field instructor, and/or faculty feel important to discuss in greater detail may be elaborated upon.

V. EDUCATIONAL OBJECTIVES FOR NEXT QUARTER (AND/OR REST OF THE YEAR)

These objectives should be explicated as clearly as possible, and they should be related to the evaluation of student's performance this past quarter. There should also be specific suggestions for ways to assist the student in moving towards these objectives.

Checklist

Name of Student: _____

	Student Rating	F.I. Rating
I. Learning Patterns:		
A. Shares his work with others		
B. Seeks feedback and critique regarding his work		
C. Shows ability to evaluate his own work		
D. Shows ability to apply basic concepts and principles		
E. Contributes to the learning of others		
II. Communication:		
A. Expresses himself clearly in verbal communication with others		
1. Clients		
2. Persons in authority		
3. Professional staff		
4. Indigenous community leaders		
5. Classmates		
6. Others _____		
B. Demonstrates ability for establishing warm, helping relationships		
C. Demonstrates acceptance of self and others		
D. Expresses differing points of view without deprecating those with whom he disagrees		
E. Demonstrates basic skills in written communication		
F. Shows ability to organize written material		
G. Clearly records factual material		
H. Shows ability to record attitudinal and feeling content.		
I. Shows ability to describe his own actions		
J. Shows consistency in the verbal and non-verbal message which he gives		
K. Demonstrates ability to listen		
L. Demonstrates ability to hear underlying message		
M. Demonstrates ability to pick up non-verbal cues		
N. Demonstrates ability to give feedback		
III. Observation:		
A. Demonstrates ability to report behavior in specific, non-labeling terms		
B. Demonstrates ability to individualize persons and setting being observed		
C. Demonstrates ability to describe the environmental context		

	Student Rating	F.I. Rating	Faculty Rating
IV. Work Habits:			
A. Is on time for appointments.....	_____	_____	_____
B. Shows responsibility for work coverage.....	_____	_____	_____
C. Completes assignments on time.....	_____	_____	_____
V. Problem Definition:			
A. Shows ability to state the nature of concerns which are being brought to his attention.....	_____	_____	_____
B. Shows ability to perceive possible related and underlying concerns.....	_____	_____	_____
VI. Fact Finding:			
A. Shows purposefulness in gathering facts.....	_____	_____	_____
B. Shows selectivity in fact gathering.....	_____	_____	_____
C. Demonstrates ability to order facts.....	_____	_____	_____
D. Shows ability to engage in speculation as to the meaning of the data.....	_____	_____	_____
VII. Values:			
A. Shows awareness of social work values.....	_____	_____	_____
B. Shows awareness of client and societal values..	_____	_____	_____
C. Shows awareness of service system values.....	_____	_____	_____
D. Shows awareness of his own value system.....	_____	_____	_____
E. Shows ability to identify points of value conflict.....	_____	_____	_____

VIII. Assessment:	Student Rating	F.I. Rating
A. Shows ability to perceive transactions within a "person-to-situation" framework.....	_____	_____
B. Shows ability to identify socio-cultural factors contributing to the problem to which he is addressing himself.....	_____	_____
C. Shows ability to identify psychological factors.....	_____	_____
D. Shows ability to identify biological factors.....	_____	_____
E. Shows ability to see the inter-relatedness of these factors.....	_____	_____
F. Shows ability to identify the major systems involved in the transactional network with which he is concerned in relation to the problem(s) to which he is addressing himself.....	_____	_____
G. Shows ability to identify strengths and resources in the transacting systems and in the trans-actional network itself.....	_____	_____
H. Shows ability to identify breakdowns or dys-functions, or possible sources of breakdowns or dysfunctions, in the transacting systems and in the transactional network itself.....	_____	_____
I. Shows ability to determine which of several systems involved in the situation to select as his major unit(s) of attention.....	_____	_____
J. Shows ability to assess the degree of openness-closedness of systems as related to their potential for change.....	_____	_____
K. Shows ability to openly assess his own strengths and limitations as a change agent.....	_____	_____
IX. Service Design:		
A. Works collaboratively with other participants involved with the problem of concern.....	_____	_____
B. Formulates objectives for work to be done.....	_____	_____
C. Formulates a range of potential approaches.....	_____	_____

	Student Rating	F.I. Rating

Service Design (Cont'd)

D. Selects a plan of action which takes into consideration available resources (people, organizations, energy, time, cost)..... _____ _____

E. Takes into consideration his own knowledge, skill, and time as part of a resource pool..... _____ _____

F. Supports service design with a practice theory base..... _____ _____

G. Tempers design by value consideration..... _____ _____

H. Writes service design clearly, specifying specific objectives to be achieved and interventions to be utilized..... _____ _____

X. Intervention:	Student Rating	F.I. Rating	Faculty Rating
A. Conceptualizes the intervention process as an orderly, systematic means of effecting change.....	_____	_____	_____
B. Develops differential skills for effecting change with different client system/ problem situations.....	_____	_____	_____
C. Applies knowledge of individuals, families, groups, organizations and communities in his change-directed activities.....	_____	_____	_____
D. Respects and implements the terms of contracts set with others when engaging in change activities.....	_____	_____	_____
E. Has ability to be flexible when the situation calls for a change in plans.....	_____	_____	_____
F. Shows awareness of variables affecting progress in achievement of desired outcomes.....	_____	_____	_____
G. Has realistic expectations of self and others in relation to task performance and time allotment.....	_____	_____	_____
H. Demonstrates comfort and skill in the appropriate use of verbal and non-verbal sustaining procedures (sympathetic listening, acceptance, desire to help, realistic reassurance).....	_____	_____	_____
I. Observes appropriate caution in the use of procedures of direct influence (reinforcement, suggestion, advice-giving, direct action).....	_____	_____	_____
J. Shows awareness of the usefulness and limitations of the techniques of ventilation, exploration, and reflection.....	_____	_____	_____
K. Functions with knowledge and skill in the role of broker (connecting client systems with needed resources).....	_____	_____	_____
L. As broker, differentially determines amount of worker help needed by each client system to get to resources.....	_____	_____	_____

	Student Rating	F.I. Rating	Faculty Rating
M. Shows skill in the role of mediator when persons/situations in actual or potential conflict need help to work together.....	_____	_____	_____
N. Accepts and uses appropriately the role of advocate to protect the rights of client systems who are unable to so act in their own behalf.....	_____	_____	_____
O. Uses regulatory (limit-setting, rule-making, rule-enforcing) methods with skill and comfort when appropriate.....	_____	_____	_____
P. Demonstrates knowledge and skill in the use of educative techniques when client systems or others need information to assist them in problem-solving.....	_____	_____	_____
Q. When teaching others, transmits information in ways that are non-threatening and usable.....	_____	_____	_____
R. Demonstrates ability to collaborate and share social work knowledge and skill with other members of a professional team.....	_____	_____	_____
S. Demonstrates capacity for creative and innovative thinking (e.g., in relation to program development, or to efficient and effective service delivery, or to coordination of staff, team, inter-agency efforts).....	_____	_____	_____
T. Distinguishes between crisis situations and other problem situation presented, and manages intervention accordingly (Crisis intervention emphasizes an active, directive, highly focused approach).....	_____	_____	_____
XI. Feedback:			
A. Demonstrates ability to conceptualize feedback as an integral part of relationships in problem-solving activities.....	_____	_____	_____
B. Provides feedback in his work with clients, families, colleagues, faculty and others.....	_____	_____	_____
C. Identifies signs of feeling, intellectual grasp, and behavior expressed by others in verbal and non-verbal ways.....	_____	_____	_____

	Student Rating	F.I. Rating	Faculty Rating
D. Responds to signs in verbal (spoken or written) ways to provide acknowledgement correction, or clarification.....	_____	_____	_____
E. Responds to signs in non-verbal ways to provide acknowledgement, correction, or clarification.....	_____	_____	_____
XII. Evaluation:			
A. Helps clients and others to evaluate progress with respect to goals which were agreed upon.....	_____	_____	_____
B. Assists in realistic evaluation by maintaining records of what has taken place.....	_____	_____	_____
C. Participate in the evaluation of own work.....	_____	_____	_____
D. Shows growth in ability to evaluate own work.....	_____	_____	_____
E. Accepts assistance from others in improving social work skills.....	_____	_____	_____
XIII. Termination/Transfer:			
A. Understands the psychological significance and impact of separation experiences.....	_____	_____	_____
B. Encourages client system and other to express their feelings (and expresses own) about impending termination or transfers.....	_____	_____	_____
C. Plans ahead appropriately and differentially for the ending phase with clients and others.....	_____	_____	_____
D. Maintains a healthy balance between concern for the client system and need to "let go".....	_____	_____	_____
E. Takes responsibility for termination/transfers through verbal and/or written communication.....	_____	_____	_____

/ksf
5/74

APPENDIX B

Phase 1 PAC with Cover Letter

Winter Quarter 1975

S C H O O L O F S O C I A L W O R K
WAYNE STATE UNIVERSITY DETROIT, MICHIGAN 48202

March 13,1975

Dear Student and Field Instructor:

You will undoubtedly notice a number of revisions in our Field Work Performance Evaluation format, especially in relation to the Performance Assessment Checklist (PAC) section. This represents work being done in relation to a grant which the School of Social Work received from the Educational Testing Service, Princeton, N.J., as part of their program to develop simple, usable instruments for the assessment of experiential learning by students in educational programs for the professions, such as social work.

Our interest in the use and refinement of this instrument is two-fold:

(1) to provide more specific direction to the field work curriculum of our students, and

(2) (eventually) the totality of the ratings of student performance over a period of several years will enable us to determine what is normative in terms of student performance at different points of time in relation to different levels of study (Juniors, Seniors, First Year, etc.) and to plan curriculum in relation to student performance patterns.

In other words, you are participating in an effort which eventually may have far-reaching implications for social work education. Your collaboration is greatly appreciated.

Before completing the Field Work Performance Evaluation, please refer to the instructions on page 3. Please note particularly the emphasis on the evaluation being a joint process in which students, field instructors and where possible, faculty advisors, actively participate. The Composite Field Work Performance Evaluation form (including the PAC) representing the combined ratings should be returned to the faculty liaison person by March 25, 1975.

If you have any questions, please contact your faculty liaison person.

Sincerely,

Kurt Spitzer, ACSW
Professor
Chairman, Social Work Practice Sequence

S C H O O L O F S O C I A L W O R K
WAYNE STATE UNIVERSITY DETROIT, MICHIGAN 48202

SOCIAL WORK PRACTICE PROGRAM

FIELD WORK PERFORMANCE EVALUATION

I. FACE SHEET:

A. Student's Name _____

B. Agency _____

C. Learning Center _____

D. Field Instructor _____

E. Faculty Member _____

F. Number of Clock Hours Completed _____

Minimum clock hours required:

Juniors: 77 clock hours per quarter.
Seniors: 154 clock hours per quarter.
Graduate Students: 216 clock hours per quarters.
(Graduate Social Work Practice students receive clock hour credit each quarter for the one-hour lab session included with methods class. The maximum for this is eleven hours per quarter.)

G. Recommended Field Work Grade _____

Grading system to be used:
For Graduate students, assign Satisfactory or Unsatisfactory

For Undergraduate students, use letter grades as follows:

A - Superior Performance
B - Above Average Performance
C - Average Performance
D - Below Average but Passing Performance
E - Non-Passing Performance

H. Signatures of Participants in Evaluation Process

_____ Field Instructor

_____ Student

_____ Faculty Member

II. DESCRIPTION OF FIELD EXPERIENCE:

Below please write a brief statement, including:

a) a listing of the specific learning objectives and needs of the student, as identified at the beginning of the quarter;

b) a listing of the field experiences, tasks and assignments in which the student has been actively engaged, and a description of how these were or were not related to the specific educational objectives of the student and/or the educational objectives for all students this quarter;

c) an identification of those factors in the total field experience which either enhanced or impeded the educational process. Include any such factors which you can identify in the learning center or agency. No placement is "utopian" or "problem-free." We are hoping, however, that a frank and open recognition of problems as well as strengths will lead to the development of a firm basis for the student's learning. Please evaluate here any relevant aspects of the field experience, such as educational philosophy, practice approaches, interpersonal relationships, organizational structure, administration, etc., which either strengthened or tended to interfere with student's learning experience.

(Use additional sheets if needed.)

III. Performance Assessment Checklist (PAC)

The following Performance Assessment Checklist (PAC) is designed to enable us to arrive at an assessment of the student's skill in terms of performance of the described behaviors. The PAC should provide us with some clarity regarding where the student is in his or her professional development and, at the same time, should be a useful working tool in instruction for setting educational objectives for the coming quarter. We are asking that all sections be completed. We recognize that there may be some areas for certain groups of students which have not been covered in depth in class or where there has been inadequate opportunity to observe, or for the student to perform, but we believe the ratings are still important for use as indices to measure student growth in the following quarter(s).

Instructions for use of the PAC

1. The Rating Scale: This is a 5-point scale with 1 being "rarely" and 5 being "always". Circle the appropriate number to indicate the student's performance on each item. If you feel unable to adequately judge the student's performance (for example: not enough opportunity to observe or determine the behavior, or the student has not had the opportunity to express the behavior), please comment in the space provided after each major heading, indicating the item number.

2. Additional Notations: Mark (X) next to item numbers where you feel inadequate progress has been made.
   Check (✓ AE) next to item numbers where there has been adequate progress but more concentrated attention is needed in the next quarter.

3. The space after each major heading is provided for comments or further elaboration about the student's performance on the item(s) above it. It can also be used for comment about the item itself -- your immediate response to the clarity, language, meaning or importance of the item.

4. The evaluation should be done jointly by the Student and Field Instructor and, if possible, the Faculty Advisor. Worksheets have been provided for use by the Student and Field Instructor prior to the evaluation conference. The ratings on the composite forms will represent, as much as possible, a consensus of opinion. If there is strong disagreement on any item on the PAC, comment in the space at the end of the major heading, indicating the item number.

5. The questionnaire at the end is designed to elicit your reactions to the PAC specifically. Please complete and return with the evaluation.

Name of Student _____

Scale: 1 2 3 4 5
rarely always

III. CHECKLIST (Cont'd):

A. Learning Patterns:

1. Shares work with others..... 1 2 3 4 5
2. Seeks feedback and critique regarding own work.... 1 2 3 4 5
3. Shows ability to evaluate own work..... 1 2 3 4 5
4. Shows ability to apply basic concepts and principles..... 1 2 3 4 5
5. Contributes to the learning of others..... 1 2 3 4 5

COMMENTS:

B. Work Habits:

1. Is on time for appointments..... 1 2 3 4 5
2. Shows responsibility for work coverage..... 1 2 3 4 5
3. Completes assignments on time..... 1 2 3 4 5

COMMENTS:

C. Interpersonal Communications and Relationship Skills

1.	Expresses self clearly in verbal communication	1	2	3	4	5
2.	Demonstrates ability for establishing warm, helping relationships	1	2	3	4	5
3.	Demonstrates acceptance of self and others	1	2	3	4	5
4.	Expresses differing points of view without deprecating others	1	2	3	4	5
5.	Expresses self clearly in written communication	1	2	3	4	5
6.	Shows ability to organize written material	1	2	3	4	5
7.	Records factual material clearly	1	2	3	4	5
8.	Shows ability to record attitudinal and feeling content	1	2	3	4	5
9.	Shows ability to describe own actions	1	2	3	4	5
10.	Shows consistency in the verbal and non-verbal messages given	1	2	3	4	5
11.	Demonstrates ability to listen	1	2	3	4	5
12.	Demonstrates ability to hear underlying message	1	2	3	4	5
13.	Picks up signs of feeling, intellectual grasp, and behavior expressed by others in verbal and non-verbal ways	1	2	3	4	5
14.	Responds to signs in verbal ways (spoken/written) to provide acknowledgement, correction or clarification	1	2	3	4	5
15.	Responds to signs in non-verbal ways to provide acknowledgement, correction, or clarification	1	2	3	4	5

COMMENTS:

D. Observation:

1. Demonstrates ability to report behavior in specific non-labeling terms	1	2	3	4	5
2. Demonstrates ability to individualize persons being observed	1	2	3	4	5
3. Demonstrates ability to describe the environmental context	1	2	3	4	5

COMMENTS:

E. Problem Definition:

1. Shows ability to state nature of concerns which are being brought to his/her attention	1	2	3	4	5
2. Shows ability to perceive possible related and underlying concerns	1	2	3	4	5

COMMENTS:

F. Fact Finding:

1. Shows purposefulness in gathering facts	1	2	3	4	5
2. Shows selectivity in facts gathering	1	2	3	4	5
3. Demonstrates ability to organize facts	1	2	3	4	5
4. Shows ability to engage in speculation as to meaning of the data	1	2	3	4	5

COMMENTS:

C. Values:

1. Shows awareness of social work values	1	2	3	4	5
2. Shows awareness of client and societal values	1	2	3	4	5
3. Shows awareness of service system values	1	2	3	4	5
4. Shows awareness of own value system	1	2	3	4	5
5. Shows ability to identify points of value conflict	1	2	3	4	5

COMMENTS:

H. Assessment:

1. Shows ability to assess transactions from a social-interactional perspective	1	2	3	4	5
2. Shows ability to identify the major systems involved in the transactional network concerned in relation to the problem(s) which he/she is addressing	1	2	3	4	5
3. Shows ability to identify strengths and resources within the transacting systems and in the transactional network itself	1	2	3	4	5
4. Shows ability to identify breakdowns or dysfunctions and contributing factors within the transacting systems and in the transactional network itself	1	2	3	4	5
5. Shows ability to see the inter-relatedness of these factors	1	2	3	4	5
6. Shows ability to assess the degree of openness-closedness of systems as related to their potential for change	1	2	3	4	5
7. Shows ability to openly assess own strengths and limitations as a change agent	1	2	3	4	5
8. Shows ability to determine which of several systems involved in the situation to select as major unit(s) of attention	1	2	3	4	5

COMMENTS:

I. Designing A Plan of Action:

1. Takes initiative to collaborate with others involved with the problem in formulating objectives and selecting a plan of action	1	2	3	4	5
2. Exhibits skill in helping others to identify and explore alternative courses of action and the potential consequences of each	1	2	3	4	5
3. Makes conscious use of verbal or written contract-setting (working agreement) as a requisite for plan adoption	1	2	3	4	5
4. Adopts a plan of action which takes into consideration available resources (people, organizations, energy, time, cost, etc.)	1	2	3	4	5
5. Takes into consideration own knowledge, skill and time as part of a resource pool	1	2	3	4	5
6. Tempers plan of action with consideration of the values of the profession and of the participants	1	2	3	4	5
7. Writes and discusses plan of action clearly, specifying objectives to be achieved, interventions to be utilized, and specific tasks and roles of those involved	1	2	3	4	5
8. Exhibits skill in helping others translate goals into tasks/steps	1	2	3	4	5
9. Determines which of several systems involved in the situation to select as the major unit(s) of attention	1	2	3	4	5
10. Plans differentially for each individual client/ problem situation, avoiding use of a singular or fad approach	1	2	3	4	5
11. Builds into the plan of action the means for later evaluation of outcomes	1	2	3	4	5
12. Identifies theories and practice models which support and contribute to the plan of action	1	2	3	4	5
13. Recognizes that no plan is rigid or sacred, but that a plan is needed	1	2	3	4	5

COMMENTS:

J. Intervention:

1.	Conceptualizes the intervention process as an orderly, systematic means of effecting change.....	1	2	3	4	5
2.	Develops differential skills for effecting change with different client system/problem situations.....	1	2	3	4	5
3.	Applies knowledge of individuals, families, groups, organizations and communities in his/her change-directed activities.....	1	2	3	4	5
4.	Has ability to be flexible when the situation calls for a change in plans.....	1	2	3	4	5
5.	Plans intervention(s) with awareness of variables which may affect progress in achievement of desired outcome.....	1	2	3	4	5
6.	Has realistic expectations of self and others in relation to task performance and time allotment...	1	2	3	4	5
7.	Demonstrates comfort and skill in the appropriate use of verbal and non-verbal sustaining procedures (sympathetic listening, acceptance, desire to help, realistic reassurance).....	1	2	3	4	5
8.	Observes appropriate caution in the use of procedures of direct influence (reinforcement, suggestions, advice-giving, direct action).....	1	2	3	4	5
9.	Shows awareness of the usefulness and limitations of the techniques of ventilation, exploration, and reflection.....	1	2	3	4	5
10.	Uses knowledge and skill in connecting client systems with needed resources (functions as "broker").....	1	2	3	4	5
11.	As broker--differentially determines amount of worker help needed by each client system to get to resources.....	1	2	3	4	5
12.	Shows skill in role of mediator when persons/ situations in actual or potential conflict need help to work together.....	1	2	3	4	5
13.	Accepts and uses appropriately the role of advocate to protect the rights of client systems who are unable to so act in their own behalf.....	1	2	3	4	5
14.	Uses regulatory (limit-setting, rule-making, rule-enforcing) methods with skill and comfort when appropriate.....	1	2	3	4	5
15.	Demonstrates knowledge and skill in the use of educative techniques when client systems or others need information to assist them in problem-solving.....	1	2	3	4	5

continued -

J. Intervention (cont.)

16.	When teaching others, transmits information in ways that are non-threatening and usable	1	2	3	4	5
17.	Demonstrates ability to collaborate and share social work knowledge and skill with other members of a professional team in implementing plan(s) of action	1	2	3	4	5
18.	Demonstrates capacity for creative and innovative thinking (in relation to program development, or to efficient and effective service delivery, or to coordination of staff, team, inter-agency efforts)	1	2	3	4	5
19.	Distinguishes between crisis situations and other problem situation presented, and manages interventions accordingly (Crisis intervention emphasizes an active, directive, highly focused approach)	1	2	3	4	5

COMMENTS:

K. Termination/Transfer:

1. Understands the psychological significance and impact of separation experiences	1	2	3	4	5
2. Encourages client system and others to express their feelings (and expresses own) about impending terminations or transfers	1	2	3	4	5
3. Plans ahead appropriately and differentially for the ending phase with clients and others	1	2	3	4	5
4. Maintains a healthy balance between concern for the client system and need to "let go"	1	2	3	4	5
5. Takes responsibility for terminations/transfers through verbal and/or written communication	1	2	3	4	5

COMMENTS:

L. Evaluation:

1. Helps clients and others to evaluate movement toward agreed-upon goals	1	2	3	4	5
2. Assists in realistic evaluation by maintaining records of what has taken place	1	2	3	4	5
3. Participates in evaluation of own work	1	2	3	4	5
4. Shows ability to use evaluations as a basis for changing course of action	1	2	3	4	5

COMMENTS:

IV. SUMMARY STATEMENT, including EDUCATIONAL OBJECTIVES FOR NEXT QUARTER (AND/OR REST OF THE YEAR)

Objectives should be related to the evaluation of student's performance this past quarter. The objectives should be stated in behaviorally specific terms, such as: "Develop increased ability to pick up non-verbal clues," or "Develop greater selectivity in fact gathering." There should also be specific suggestions for ways to assist the student in moving towards these objectives, and the types of assignments to be provided, such as: "Supportive work with individuals," or "Assignments which involve helping families improve their interpersonal communication skills," etc.

(Use additional sheets if needed.)

V. QUESTIONNAIRE: (Use additional sheets if needed.)

1. Are the areas covered relevant? Yes _____ No_____

   Are there areas which should be added _____? deleted?_____

   Which? _____

   _____

   _____

   _____

2. Is the checklist organized in a coherent and logical order? Yes ____ No ____

   Are there redundancies? Yes _____ No _____

   Where? _____

   _____

   _____

   Suggestions for change _____

   _____

   _____

3. Is the language clear? Yes _____ No _____

   Do you understand the intent? Yes _____ No _____

   Identify specific items where you think there's a lack of clarity:

   _____

   _____

   Suggestions for re-wording _____

   _____

   _____

4. Does the length of the checklist affect its usefulness? Yes _____ No _____

   Is it too long? _____ too short? _____

5. Is the rating scale easy to use and understand? Yes _____ No _____

   Are you satisfied with the designations rarely and always? Yes _____ No _____

   Other suggestions _____

   _____

   _____

6. Do you feel it is helpful for Faculty Advisor to participate in the evaluation conference? Yes _____ No _____

   Why? _____

   _____

   _____

7. Roughly how much time did you spend in the evaluation process, including the preparation of work sheets?

   _____

8. Do you feel the PAC is useful as a working tool for setting educational objectives? Yes _____ No _____

   In what ways? _____

   _____

   _____

APPENDIX C

Phase 2 PAC with Cover Letter

Spring Quarter 1975

S C H O O L O F S O C I A L W O R K
WAYNE STATE UNIVERSITY DETROIT, MICHIGAN 48202

May 27, 1975

Dear Student and Field Instructor:

You will notice several changes in the Performance Assessment Checklist (PAC) this quarter based on your feedback from last quarter. For example, we have made the PAC somewhat shorter and have tried to eliminate redundancies as many of you suggested.

We are also making the following change in the instructions on page three:

> In instances where it is not possible to arrive at a consensus between student and field instructor (as per instruction 4, page 3), we now are asking for separate ratings from field instructors and students. These ratings should be on the same page, however, with the student's ratings in red ink or pencil and the field instructor's in any other color. It is assumed that a rating with only one number circled indicates agreement between student and field instructor.

We are requesting faculty advisors to be available to clarify areas of difficulty which may arise in the use of the PAC, and to participate in the evaluation procedure if at all possible.

We would like to emphasize that there are no grade implications with the PAC. It is entirely possible for a student to be rated with all 3's and to receive an "A" or "Satisfactory" grade. The instrument is meant to provide the student, field instructor and faculty advisor with a picture of the student's strengths in performance of the described behaviors and the areas needing more attention. The number you circle on the rating scale, therefore, should represent, as nearly as possible, the frequency of the student's performance of the described behaviors.

All field work evaluations should be completed and returned to faculty advisors by Monday, June 16, 1975.

Sincerely,

Kurt Spitzer

Kurt Spitzer, ACSW
Professor
Chairman, Social Work Practice Sequence

S C H O O L O F S O C I A L W O R K
WAYNE STATE UNIVERSITY DETROIT, MICHIGAN 48202

SOCIAL WORK PRACTICE PROGRAM
FIELD WORK PERFORMANCE EVALUATION

I. FACE SHEET:

A. Student's Name _____

B. Agency _____

C. Learning Center _____

D. Field Instructor _____

E. Faculty Member _____

F. Number of Clock Hours Completed _____

Minimum clock hours required:

Juniors: 81 clock hours per quarter.
Seniors: 162 clock hours per quarter.
Graduate Students: 216 clock hours per quarter.
(Graduate Social Work Practice students receive clock hour credit each quarter for the one-hour lab session included with methods class. The maximum for this is eleven hours per quarter.)

G. Recommended Field Work Grade _____

Grading system to be used:
For Graduate students, assign Satisfactory or Unsatisfactory.

For Undergraduate students, use letter grades as follows:

A - Superior Performance
B - Above Average Performance
C - Average Performance
D - Below Average but Passing Performance
E - Non-Passing Performance

H. Signatures of Participants in Evaluation Process

_____ _____
Field Instructor Student

_____
Faculty Member

I. Date _____

II. DESCRIPTION OF FIELD EXPERIENCE:

Below please write a brief statement, including:

a) a listing of the specific learning objectives and needs of the student, as identified at the beginning of the quarter;

b) a listing of the field experiences, tasks and assignments in which the student has been actively engaged, and a description of how these were or were not related to the specific educational objectives of the student and/or the educational objectives for all students this quarter;

c) an identification of those factors in the total field experience which either enhanced or impeded the educational process. Include any such factors which you can identify in the learning center or agency. No placement is "utopian" or "problem-free." We are hoping, however, that a frank and open recognition of problems as well as strengths will lead to the development of a firm basis for the student's learning. Please evaluate here any relevant aspects of the field experience, such as educational philosophy, practice approaches, interpersonal relationships, organizational structure, administration, etc., which either strengthened or tended to interfere with student's learning experience.

(Use additional sheets if needed.)

III. Performance Assessment Checklist (PAC)

The following Performance Assessment Checklist (PAC) is designed to enable us to arrive at an assessment of the student's skill in terms of performance of the described behaviors. The PAC should provide us with some clarity regarding where the student is in his or her professional development and, at the same time, should be a useful working tool in instruction for setting educational objectives for the coming quarter. We are asking that all sections be completed. We recognize that there may be some areas for certain groups of students which have not been covered in depth in class or where there has been inadequate opportunity to observe, or for the student to perform, but we believe the ratings are still important for use as indices to measure student growth the following quarter(s).

Instructions for use of the PAC

1. The Rating Scale: This is a 5-point scale with 1 being "rarely" and 5 being "consistently." Circle the appropriate number to indicate the student's performance on each item. If you feel unable to adequately judge the student's performace (for example: not enough opportunity to observe or determine the behavior, or the student has not had the opportunity to express the behavior), please comment in the space provided after each major heading, indicating the item number.

2. Additional Notations: Mark (X) next to item numbers where you feel inadequate progress has been made.
   Check (✓AE) next to item numbers where there has been adequate progress but more concentrated attention is needed in the next quarter.

3. The space after each major heading is provided for comments or further elaboration about the student's performance on the item(s) above it. It can also be used for comment about the item itself -- your immediate response to the clarity, language, meaning or importance of the item.

4. The evaluation should be done jointly by the Student and Field Instructor and, if possible, the Faculty Advisor. Worksheets have been provided for use by the Student and Field Instructor prior to the evaluation conference. The ratings on the composite forms will represent, as much as possible, a consensus of opinion. If there is strong disagreement on any item on the PAC, comment in the space at the end of the major heading, indicating the item number.

Scale: 1 2 3 4 5
rarely consistently

III. CHECKLIST (Cont.):

BASIC EDUCATIONAL AND PERFORMANCE SKILLS

A. Learning Patterns:

1. Shares work with others	1	2	3	4	5
2. Seeks feedback and critique regarding own work	1	2	3	4	5
3. Shows ability to evaluate own work	1	2	3	4	5
4. Shows ability to apply basic concepts and principles ..	1	2	3	4	5
5. Contributes to the learning of others	1	2	3	4	5

B. Work Habits:

1. Is on time for appointments	1	2	3	4	5
2. Shows responsibility for work coverage	1	2	3	4	5
3. Completes assignments on time	1	2	3	4	5

C. Values:

1. Shows awareness of social work values (for example: confidentiality, individuality, etc.)	1	2	3	4	5
2. Shows awareness of client and societal values	1	2	3	4	5
3. Shows awareness of service system values	1	2	3	4	5
4. Shows awareness of own value system	1	2	3	4	5
5. Shows ability to identify points of value conflict	1	2	3	4	5

COMMENTS:

Scale: 1 2 3 4 5
rarely consistently

COMMUNICATION AND OBSERVATION SKILLS

D. Interpersonal Communications and Relationship Skills:

1.	Expresses self clearly in verbal communication	1	2	3	4	5
2.	Demonstrates ability for establishing warm, helping relationships	1	2	3	4	5
3.	Demonstrates accepatance of self and others	1	2	3	4	5
4.	Expresses differing points of view without deprecating others	1	2	3	4	5
5.	Expresses self clearly in written communication	1	2	3	4	5
6.	Shows ability to organize written material	1	2	3	4	5
7.	Records factual material clearly	1	2	3	4	5
8.	Shows ability to record attitudinal and feeling content	1	2	3	4	5
9.	Shows ability to describe own actions	1	2	3	4	5
10.	Shows consistency in the verbal and non-verbal messages given	1	2	3	4	5
11.	Demonstrates ability to listen	1	2	3	4	5
12.	Demonstrates ability to hear underlying message	1	2	3	4	5
13.	Picks up signs of feeling, intellectual grasp, and behavior expressed by others in verbal and non-verbal ways	1	2	3	4	5
14.	Responds to signs in verbal ways (spoken/written) to provide acknowledgement, correction or clarification	1	2	3	4	5
15.	Responds to signs in non-verbal ways to provide acknowledgement, correction, or clarification	1	2	3	4	5

E. Observation:

1.	Demonstrates ability to report behavior in specific non-labeling terms	1	2	3	4	5
2.	Demonstrates ability to individualize persons being observed	1	2	3	4	5
3.	Demonstrates ability to describe the environmental context	1	2	3	4	5

COMMENTS:

Scale: 1 2 3 4 5
rarely consistently

PROBLEM SOLVING SKILLS

F. Problem Definition:

1. Shows ability to state nature of concerns which are being brought to his/her attention	1	2	3	4	5
2. Shows ability to perceive possible related and underlying concerns	1	2	3	4	5

G. Fact Finding:

1. Shows purposefulness in gathering facts	1	2	3	4	5
2. Shows selectivity in facts gathering	1	2	3	4	5
3. Demonstrates ability to organize facts	1	2	3	4	5
4. Shows ability to engage in speculation as to meaning of the data	1	2	3	4	5

H. Assessment:

1. Shows ability to identify the major systems involved with the problem(s) being addressed	1	2	3	4	5
2. Shows ability to identify strengths and resources within the transacting systems and in their transaction with one another	1	2	3	4	5
3. Shows ability to identify breakdowns or dysfunctions and contributing factors	1	2	3	4	5
4. Shows ability to see the inter-relatedness of these factors	1	2	3	4	5
5. Shows ability to assess the degree of openness-closedness of systems as related to their potential for change	1	2	3	4	5

COMMENTS:

Scale: 1x 2 3 4 5
rarely consistently

PROBLEM SOLVING SKILLS (Continued)

I. Designing A Plan of Action:

1.	Takes initiative to collaborate with others involved with the problem in formulating objectives and selecting a plan of action	1	2	3	4	5
2.	Exhibits skill in helping others to identify and explore alternative courses of action and the potential consequences of each	1	2	3	4	5
3.	Makes conscious use of verbal or wirtten contract-setting (working agreement) as a requisite for plan adoption	1	2	3	4	5
4.	Adopts a plan of action which takes into consideration available resources (people, organizations, energy, time, cost, etc.)	1	2	3	4	5
5.	Takes into consideration own knowledge, skill and time	1	2	3	4	5
6.	Takes into consideration the values of the profession and of the systems involved	1	2	3	4	5
7.	Writes and discusses plan of action clearly, specifying objectives to be achieved, interventions to be utilized, and specific tasks and roles of those involved	1	2	3	4	5
8.	Exhibits skill in helping others translate goals into tasks/steps	1	2	3	4	5
9.	Determines which of several systems involved in the situation to select as the major unit(s) of attention	1	2	3	4	5
10.	Plans differentially for each individual client/ problem situation, avoiding use of a singular or fad approach	1	2	3	4	5
11.	Builds into the plan of action the means for later evaluation of outcomes	1	2	3	4	5
12.	Identifies theories and practice models which support and contribute to the plan of action	1	2	3	4	5
13.	Recognizes that no plan is rigid or sacred, but that a plan is needed	1	2	3	4	5

COMMENTS:

Scale: 1 2 3 4 5
rarely consistently

PROBLEM SOLVING SKILLS (Continued)

J. Intervention:

1. Conceptualizes the intervention process as an orderly, systematic means of effecting change utilizing a general systems perspective and knowledge of the functioning of individuals, families, groups, organizations and communities 1 2 3 4 5
2. Has realistic expectations of self and others in relation to task performance and time allotment 1 2 3 4 5
3. Demonstrates ability to collaborate and share social work knowledge and skill with other members of a professional team or work group in implementing plan(s) of action 1 2 3 4 5
4. Demonstrates capacity for creative and innovative thinking (in relation to program development, or to efficient and effective service delivery, or to coordination of staff, team, inter-agency efforts)..... 1 2 3 4 5
5. Demonstrates comfort and skill in the appropriate use of verbal and non-verbal sustaining procedures (sympathetic listening, acceptance, desire to help, realistic reassurance) 1 2 3 4 5
6. Shows awareness of the usefulness and limitations of the techniques of ventilation, exploration, reflection and problem-solving 1 2 3 4 5
7. Uses direct influence and regulatory procedures (reinforcement, suggestions, advice-giving, limit-setting, rule-making, rule-enforcing) with caution, interpersonal sensitivity, and only when appropriate .. 1 2 3 4 5
8. Distinguishes between crisis situations and other problem situation presented, and manages interventions accordingly (Crisis intervention emphasizes an active, directive, highly focused approach)..... 1 2 3 4 5
9. Uses knowledge and skill in connecting client systems with needed resources ("brokerage" function) and differentially determines the type and amount of worker help needed by each client system to get to resources 1 2 3 4 5
10. Shows skill in role of mediator when persons in actual or potential conflict need help to work together 1 2 3 4 5
11. Accepts and uses appropriately and with sensitivity to all concerned, the role of advocate to protect the rights of client systems unable to so act in their own behalf 1 2 3 4 5
12. Demonstrates knowledge and skill in use of educative techniques when client systems or others need information to assist them in problem-solving and transmits information in ways that are non-threatening and usable 1 2 3 4 5

COMMENTS:

Scale: 1 2 3 4 5
rarely consistently

PROBLEM SOLVING SKILLS (Continued)

K. Termination/Transfer:

1. Understands the psychological significance and impact of separation experience 1 2 3 4 5
2. Encourages client system and others to express their feelings (and expresses own) about impending terminations or transfers 1 2 3 4 5
3. Plans ahead appropriately and differentially for the ending phase with clients and others 1 2 3 4 5
4. Maintains a healthy balance between concern for the client system and need to "let go" 1 2 3 4 5
5. Takes responsibility for terminations/transfers through verbal and/or written communication 1 2 3 4 5

L. Evaluation:

1. Helps clients and others to evaluate movement toward agreed-upon goals 1 2 3 4 5
2. Assists in realistic evaluation by maintaining records of what has taken place 1 2 3 4 5
3. Participates in evaluation of own work 1 2 3 4 5
4. Shows ability to use evaluations as a basis for changing course of action 1 2 3 4 5

COMMENTS:

IV. SUMMARY STATEMENT, including EDUCATIONAL OBJECTIVES FOR NEXT QUARTER (AND/OR REST OF THE YEAR)

Objectives should be related to the evaluation of student's performance this past quarter. The objectives should be stated in behaviorally specific terms, such as: "Develop increased ability to pick up non-verbal clues." or "Develop greater selectivity in fact gathering." There should also be specific suggestions for ways to assist the student in moving towards these objectives, and the types of assignments to be provided, such as: "Supportive work with individuals." or "Assignments which involve helping families improve their interpersonal communication skills." etc.

(Use additional sheets if needed.)

4/75

CAEL INSTITUTIONAL REPORTS

No. 1	The Use of Expert Judgment In The Assessment Of Demonstrated Learning In The Antioch College Yellow Springs Adult Degree Completion Program	$2.00
No. 2	Interpersonal Learning In An Academic Setting: Theory and Practice	$2.00
No. 3	Evaluation and Expert Judgment	$2.00
No. 4	The Refinement and Modification Of An Instrument For Assessing The Achievement of Interpersonal Skills of Social Work Students	$2.00
No. 5	Guidelines and Procedures For The Assessment Of Experiential Learning and For The Selection and Training Of Field Experts	$2.00